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How to Add a Household?

Step 1: Go to People > Households > Hse-List.

Step 2: Click on Add New Household at the bottom of the window

Field Definition examples:

Title:

- If Married Couple Title=Mr. & Mrs. or Mr. & Dr.
- If Single Person Title=Mr. or Mrs.
- Many People will leave this field blank.

First Name:

- If Married Couple First Name=John & Mary or Mary & John
- If Single Person First Name=John or Mary
- This field is never blank. It must contain the Head(s) of households

Last Name:

- If Married Couple with same last name. Last Name=Anderson
- If Married Couple with different last names. Last Name=Anderson(Smith) The primary last name of the household would be Anderson and the Secondary name would be Smith.
- If Married Couple with different last names and the wife hyphenates her last name Smith after his name Anderson. Last Name=Anderson(-Smith) The parenthesis are important here to distinguish that John does not hyphenate his name.
- If Married Couple with different last names and the wife hyphenates her last name Smith after his name Anderson. Last Name=Anderson(-Smith)
- If Married Couple both hyphenates their last names . Last Name=Anderson-Smith

Status:

- The status field is used to designate different types of households. The system offers four default status codes of Active, Inactive, Visitor and Delete. You can add as many of these as you wish by going to Organization > Preferences > Church Membership. On the right side locate the field "Select Drop Down List" and select "Status". Enter the Status you wish to add in the New / Modified Value and click Save New / Modify button.
- The most common Status codes we see are: (This field has a maximum of 15 characters so some of these are abbreviated.
 1. Active
 2. Inactive
 3. Visitor
 4. Delete
 5. Active NonMem (Abbreviation for Active Non-Member)
 6. Associate Mem (Associate Member)
 7. Friend

8. Prospect

9. Shutin

- Do not add a status code where an individual can fall into more than one code. Example: don't add choir since a Choir member can also be an Active Member. Don't add Employee since an employee could be Active or Friend. Choir members belong in Groups.

Status Date:

- The Status Date can be used in several ways. Most will change the status date each time the household Status is changed. Some will change the date everytime a field is modified on the window. You could also use it as the date the household joined the church.

Once you are done filling in all the fields click the button "Save". Once the household is added you should add all the members into the household by clicking on "Add - View Members".

Add/Modify Household Email Addresses?

Step 1: Go to People > Households > Hse-List.

Step 2: Click on the Last Name of the Household you wish to add an Email address.

Step 3: The household form contains a Household Email address you can use for the primary email address of the Household. If you wish to add additional emails to the household click "More Information".

Note: Most households will only have one primary email address and the rest of the email addresses are specific to individuals inside the household. These specific emails belong to members and should not be added as additional emails to the household. The reason for this section is for household with multiple email addresses that the household might share with everyone in the family.

* You can customize the "Email Name" box by going to Organization > Preferences > Church Membership > Modify Phone-Email Types.

Adding Household Phone Numbers?

Step 1: Go to People > Households > Hse-List.

Step 2: Click on the Last Name of the Household you wish to add the phone number.

Step 3: The household form contains a Household Phone Number for the primary phone number of the Household. If you wish to add additional phone numbers to the household click "More Information".

Note: Most households will only have one primary phone number. This number is usually the hard wire line that comes into a home. Most additional phone numbers are cell phones that are personal. These cell phone number should be added to the members. Some household only have cell phones and in these cases you should use one of them as the primary household phone number. The reason for this section is for household with multiple phone numbers that the household might share with everyone in the family.

* You can customize the Phone Numbers box by going to Organization > Preferences > Church Membership > Modify Phone-Email Types.

People > Members

Add a Member

Special Notes: A member must be attached to a household. Therefore you cannot add a member unless the household exists first.

Step 1: Go to People > Households > Hse-List.

Step 2: Click on the last name of the household you wish to add a member.

Step 3: Click the button "Add - View Members". This will bring you to the Member Form

Field Definition examples:

Preferred:

- Preferred name for Robert would be Bob
- Preferred name for William would be Bill

Maiden:

- When a person gets married they may change their last name. The maiden name should display the original name

Relationship:

- Be sure to fill this in correctly as it will affect the Church Directory. Members marked as Husband, Wife, Father, Mother, Single Male, Single Female, Divorced, Widow, Widower will not appear as a child of the household. All other relationships will.

Step 4: Click the Save Member button at the bottom left of the page to save the member.

Add a Special Event Date?

Step 1: Go to People > Members > Mem-List.

Step 2: Click on the Last Name of the Member you wish to add a Special Event.

Step 3: Click the down arrow next to "View: Select an Item" and select Special Events.

Step 4: In the Dark Blue Box click the down arrow next to Birth and select the Event you wish to Add/Modify

Step 5: Fill in the information and click Save. Don't confuse the save button in the Special Events section with the Save Member button for the primary member form. Clicking the wrong Save button will not save the information.

* You can customize the "Special Event" box by going to Organization > Preferences > Church Membership > Maintain Special Event Types.

Adding Member Email Addresses?

Step 1: Go to People > Members > Mem-List.

Step 2: Click on the Last Name of the Member you wish to add an Email address.

Step 3: Click the down arrow next to "View: Select an Item" and select Email Addresses.

Step 4: Click the Down arrow next to Email Name* and select the Email Name you wish to use.

Step 5: Enter the email address and click Save.

* You can customize the "Email Name" box by going to Organization > Preferences > Church Membership > Modify Phone-Email Types.

Adding Member Phone Numbers?

Step 1: Go to People > Members > Mem-List.

Step 2: Click on the Last Name of the Member you wish to add a Phone Number.

Step 3: Click the down arrow next to "View: Select an Item" and select Phone Numbers.

Step 4: Click the Down arrow next to Phone Name* and select the Phone Name you wish to use.

Step 5: Enter the Phone Number and click Save.

* You can customize the "Phone Name" box by going to Organization > Preferences > Church Membership > Modify Phone-Email Types.

Transfer a Member from One Household to Another

Step 1: Go to People > Members > Mem-List.

Step 2: Click on the Last Name of the Member you wish to transfer.

Step 3: Click the down arrow next to "View: Select an Item" and select Member Transfer.

Step 4: In the white box next to the find button enter in the Last Name of the household you wish to transfer the member to and click find button.

Step 5: Click on the Last Name of the Household you wish to transfer the member to.

Step 6: Press the Transfer Member button.

Note: This window will be used when people are divorced or getting married or when a child wishes to become their own household.

Contributions > Envelopes

How do Envelopes Work

Step 1: Go to Contributions > Envelopes > Env-Maintenance.

Names of Households and Members are not automatically added to the finance section. You don't have to re-type the names but you do need to tell the system which of these households and members you want to have appear in the Contribution section of the system. The contribution system allows you to specify either Households or Members as giving entities. The envelope maintenance window has two purposes:

1. Manage Envelope Numbers
2. Add Households/Members to the Contribution system

At first glance you might think purpose #1 above is more important but for churches that do not use envelope numbers purpose #2 becomes the main reason to use this window. You can have as many Households/Members as you wish with an envelope number of zero. If you are unsure of the difference between a Household and a Member please refer to Must Know #1. To make this more clear we should provide an example:

Example 1: A married couple (John & Mary) are giving a contribution. You will want to use the Household as the giving entity. That way when the Contribution Statement is sent it displays both of their names on the Statement. To add households to the finance section refer to Adding Household Envelope Numbers

Example 2: A child of a household makes a donation and want to receive a separate Contribution Statement. You don't want to add the household to the finance section unless they are also giving. Instead you want to add the Member to the finance section. To add members to the finance section refer to Adding Member Envelope Numbers.

Example 3: A single person living by themselves makes a donation. In a situation like this you could add either the household or the member record to the finance section. We suggest using the household record.

Note: You can have as many Households/Members as you wish with an envelope number of zero.

Adding Household Envelope Numbers

Go to Contributions > Envelopes > Env-Maintenance > Add/Edit Household #'s. This window has every Household name listed with a box next to their name. Enter the envelope number next to the name. There is no Save button on this window. Everything you do is automatically saved so be careful not to edit something accidentally.

Note: You can have as many Households/Members as you wish with an envelope number of zero.

Adding Member Envelope Numbers

Go to Contributions > Envelopes > Env-Maintenance > Add/Edit Member #'s. This window has every Member's name listed with a box next to their name. Enter the envelope number next to the name. There is no Save button on this window. Everything you do is automatically saved so be careful not to edit something accidentally.

Note: You can have as many Households/Members as you wish with an envelope number of zero.

Contributions > Management

How to Move Contributions From one Household/Member to Another

Go to Contributions > Management > Cont-Transfer.

This window has a left side and a right side. The left side allows you to select the the Household/Member you wish to TAKE the contributions from. The right side allows you to select the Household/Member you wish to GIVE the contributions to. The date range is especially useful if you only have one or two contributions that need to be moved and you also have others that need to be left alone.

Contributions > Batches

Contribution Reverse Posting

Step 1: Go to Contributions > Batches > Reverse Posting.

Step 2: Locate the Journal Number that you wish to either delete or reverse

Step 3: Select what you want to accomplish. If you want to completely delete the journal select the option Delete Batches from System. If you want to reverse the batch and put it back in the Entry window so you can modify it select the option Return the Batches to Contribution Entry.

Step 4: Click the Return Batches button or Delete Batches button depending on your selection in Step 3.

Step 5: Verify that you want to do it. NOTE: If you are deleting the batch it will ask you to type in YES to delete it. You MUST type in YES all upper case letters. Yes/yes/YeS will not do anything.